Chapter

1

Web Work Installation and Overview

The Web Work program is a true Web based application and uses Java script and active server pages. All of the data processing and storage is maintained on the server - there is no program or files to be installed on client workstations (other than a web browser). This Chapter contains an overview of Web Work.

Table of Contents

1.1   System Requirements

Web Work will run on any computer using a web browser capable of running Java script. All of the Web Work pages and database are stored and run on the Internet Web Server.

Browser security settings should be configured to allow 'COOKIES' and 'JAVA SCRIPT' execution.

IMPORTANT NOTE: the current version of Web Work is NOT completely certified for operation on Netscape browsers, and requires Microsoft Internet Explorer for proper operation. Some formatting of the pages may not appear correctly using Netscape.

1.1.1. Pre-installation Requirements

The following software must be loaded on the server before the installation of Web Work:

- Microsoft NT 4.0 or Higher with Service Pack 3 or Higher
- Microsoft Internet Information Service 4.0
- Microsoft Data Access Components Version 2.X
- Microsoft Internet Explorer 4.01 or Higher

Or Alternately

- Microsoft Windows 95/98 or NT4.0 Workstation running Personal Web Server
- Microsoft Internet Explorer 4.01 or Higher
- Microsoft Data Access Components Version 2.X

The following software must be loaded on the client machines that will be running Web Work:

- Microsoft Internet Explorer 4.01 or Higher

Please Note:

- Web Work$^{®©}$ requires that each page be refreshed when accessed (i.e. no page caching). See page 1-4 and 1-5 of the Web Work user's manual for more information.

- The installation of Microsoft Data Access Components, requires a reboot.

- If you have purchased the SQL Server or Oracle database solutions, you must purchase, install and configure your SQL Server or Oracle server prior to installing the Web Work system.

2.1   System Setup

PLEASE SEE "INSTALL.PDF" FOR WEB WORK INSTALLATION INSTRUCTIONS.

2.1.1.   Web Browser Setup

It is important to ensure your Web browser is set up properly to ensure optimum performance of the Web Work system. To access these screens click on the Tools menu item in Internet Explorer and select Internet Options from the drop down menu. Check to make sure your web browser settings are set as follows.

Set the Internet Settings to check for newer versions of stored pages on every visit to the page.

Click on the Settings Button.

Click on the radio button beside Every visit to the page.
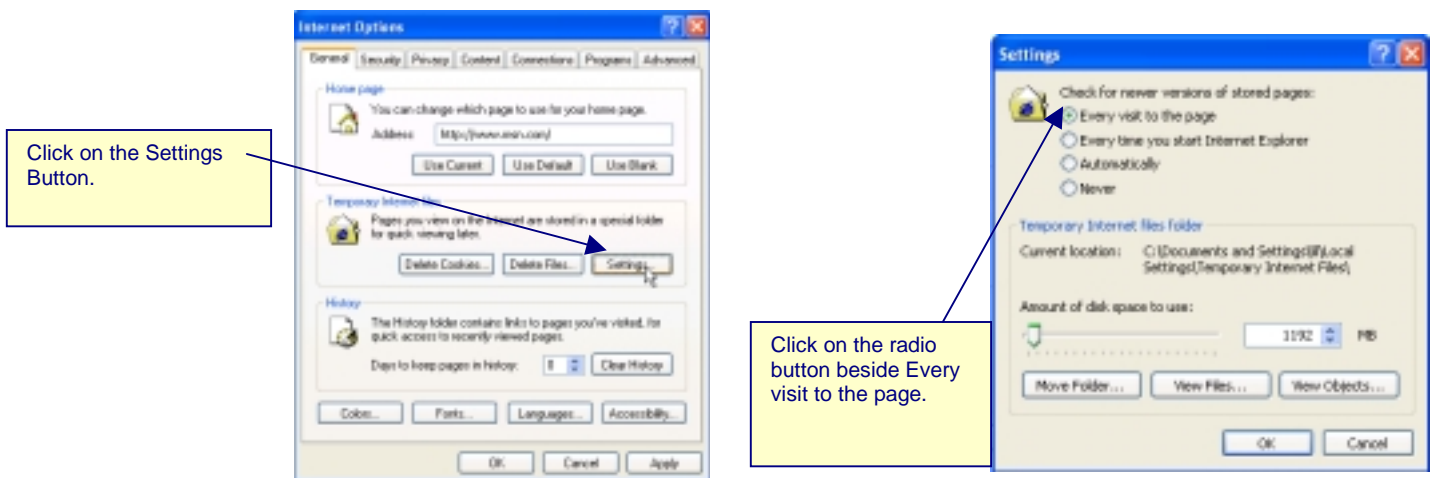
Be sure to clean out your Temporary Internet Files often. This will increase speed and reduce problems.

2.1.2. <u>Disabling Server Side Debugging</u>

Enabling server-side debugging is one of the worst things you can do to hamper performance of a production IIS server. When ASP server-side debugging is turned on, all ASP requests are serialized, lining up to be processed one at a time – note this is not true for client side debugging. The effect this can have on even a moderately busy web site is disastrous.

To ensure the setting is disabled:

- o   Right click on your Web site in the Internet Information Services snap In
- o   Choose Properties.
- o   On the Home Directory tab, click configuration.
- o   Select the App Debugging tab and make sure the Enable ASP server side script debugging is not selected.
- o   Programmically, you can disable server side debugging with the following code:

Set oADS=GetObject("IIS://localhost/W3SVC")
OADS.AppAllowDebugging=False
OADS.SetInfo
Set oADS=Nothing

2.1.3. <u>Changing the Timeout Default</u>

If you leave the Web Work system without logging off, the database connection will close after 30 minutes.

To change the timeout default:

1. Find the file in your Web Work directory called Frames.asp.
2. Open the file using a text editor such as Note Pad.
3. Find the line that says "Session.Timeout =30" (approximately line 43)
4. Change the 30 to whatever timeout you wish to use (in minutes).
5. Save the file.

3.1 Logging into the System

To access Web Work open your Internet browser (MS Internet Explorer) and type in the Address where Web Work is located. (ie: www.teroconsulting.com/webwork)

The Web Work Login screen for your company will appear. Type in your user name and password, and then press the ENTER key on your keyboard to open the system. The "default" user name is Tero and the default password is demo.

To return to this page every time you enter your browser, set this URL as your Home Page or add it to your "Favorites" (MS Internet Explorer).
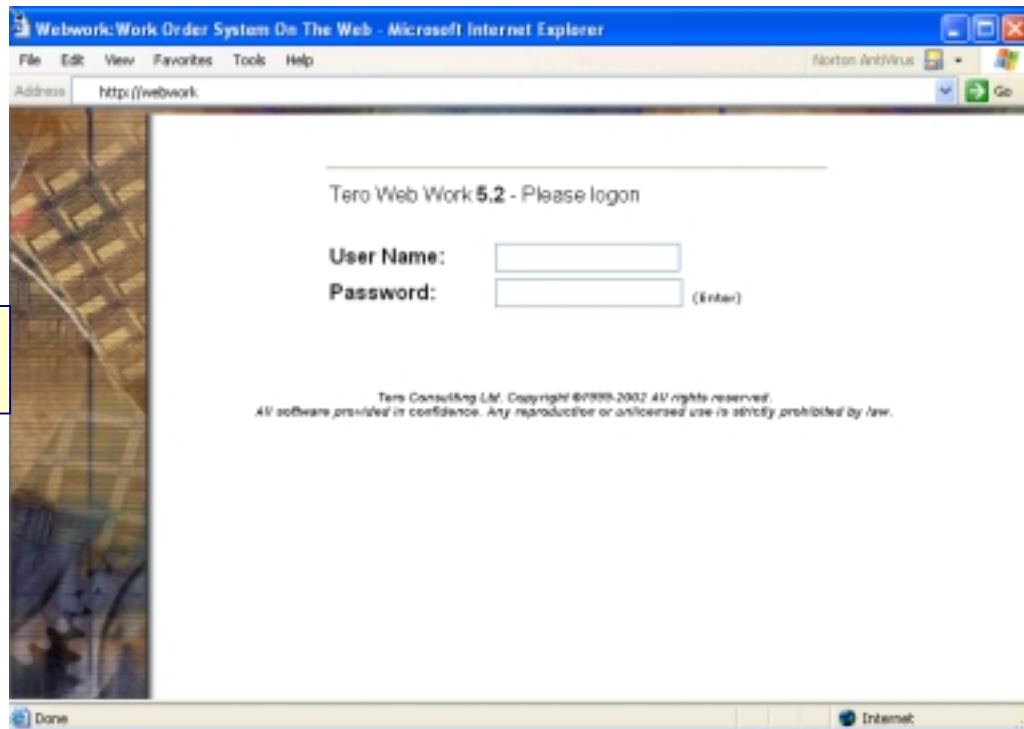
The default User Name is Tero and the Password is Demo.

For more information on setting up a new user see Labour – Operations. For information on assigning a user to a user group and for setting permissions for that user group see Admin. – Operations. Information on changing your password is located at the end of this section of the manual and also in the admin chapter of this manual.

3.1.1. To Exit the System

To exit the Web Work Order System click on the LOG OFF button **LOG OFF** at the left hand side of the screen.

If you exit the program without logging off, the connection to the database will stay open until the connection times out (default is 30 minutes). See changing timeout in this section of the manual for information on how to change the timeout default.

4.1   System Overview

4.1.1. <u>Web Work Screen Modes</u>

The current mode is displayed on the bottom left hand side of any Web Work screen. (ie: query, edit, new) The default mode when you enter a module is "query" mode. To change modes, click on the
⊙ OPERATIONS menu while in any module to display a drop down menu, which lists the Operations available for that module.

Edit Mode
In Edit mode records can be altered, additional information can be added, and the record can be resaved. To access Edit Mode you must open an existing record or create and save a new record and have it open on the screen.

New Mode
In New mode a new record is created. To enter New mode, click on the ⊙ OPERATIONS menu and select New (work order, equipment, location etc) from the drop down menu. You can also open a new record by

clicking on the NEW button NEW at the bottom right hand side of query screen.

Query Mode
In Query mode you can retrieve records based on the criteria you select. (See Query By Example below for more information)

4.1.2. <u>Query By Example</u>

Web Work uses Query by Example, which makes it easy to locate and retrieve records from the Web Work database based on criteria specified by the user. Query by Example is a method of searching a database using a blank record for each field. You can then enter criteria for each field that you want to be included in the query.

- The default mode for all modules is the "query" mode.
- To enter "query" mode from any other mode, simply click on the ⊙ OPERATIONS menu and select New (Work Order, PM, Equipment etc.) Query.
- While in Query Mode in any module, the user can select the field(s) they want to use in their query. Type a partial example of the information you wish the query to contain in any field and then click on

   the LOOKUP button LOOKUP at the bottom of the screen to display a list of the records in table format, which match the criteria selected for the query.

> Comparison operators such as: <, >, null, not null can be used in any of the fields except the description field in the Work Request, Work Order, PM and Procedure modules. To query a description field in any of these four modules simply type in a word describing the item you wish to find. For instance to find all work orders with windows in the description type windows in the description field and click on the LOOKUP button.

You can also use the % sign as a wildcard to locate records. A wildcard is a symbol that stands for one or more characters. For instance if you are in the equipment module and want to locate all records which have PUM at the beginning of their code – type PUM% into the ID field.   To locate all records which have PUM at the end of their code – type %PUM into the ID field. To locate all records which have PUM anywhere in their equipment ID type %PUM% into the ID field.

4.1.3. Wildcard Explanations

%   represents any number of any character including null

_   represents any one character including null

>   is larger than, is after

<   is smaller than, is before

null   nothing, no data entered

<>   not equal, is not

<>null   something, some data entered

> You can also retrieve all records specific to your criteria by entering the selection criteria in the appropriate field(s) and then clicking the ENTER key on your keyboard. This will open all records, which match your criteria. To move from record to record click on the arrow button at the bottom left hand side of the screen.

4.1.4. Query by Example – Example 1

To perform a Work Order Query to locate Preventive Maintenance Work Orders which are closed:

- Click on the WORK ORDERS module button [WORK ORDERS]. It is located in the menu on the left hand side of the screen.
- The Work Order module will open in Query Mode.
- Enter PM into the WO Type field.
- Enter the closed code into the work order status field.
- Click on the LOOKUP button [LOOKUP] at the bottom of the screen to display a table showing all the closed PM Work Orders contained in the Web Work database. To retrieve any of these work orders click the checkbox beside the applicable record and then click on the RETRIEVE button [RETRIEVE] to open these records. If there are more than 100 records, which match the criteria, you selected, a message box asking if you wish to retrieve all the records will appear.

4.1.5. Query by Example – Example 2

To perform a Query to locate ALL new PM Work Orders which were opened before 02/19/02:

- Enter the Work Orders module. [WORK ORDERS]
- Click on the [OPERATIONS] menu at the top of the Work Order Screen.
- Select "Work Order Query" from the menu.

- Enter PM into the WO Type field.
- Enter NEWWO into the Status field.
- Enter <02/19/2002 into the Date field.
- Press the ENTER button on your keyboard.
- All PM Work Orders opened before July 17, 2000 will open on the screen. To move from one work order to the next click on the arrow button at the bottom left hand side of the screen.

Click on any of the column headings to sort the information in ascending or descending order.
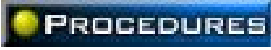
Work Order #	Request	Location ID	Equipment ID	Status	Open Date
690	LOTS OF STEAM COMING FROM THE BOILER	DIAL	DBOILER	NEWWO	2/14/2002
714	Replace broken window			NEWWO	2/17/2002
713	Fix clogged sink			NEWWO	2/17/2002
712	Replace manhole cover			NEWWO	2/17/2002
711	Replace smoke detector			NEWWO	2/17/2002
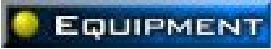
Select all   Unselect all   Retrieve Records   Order by: OpenDate

SELECT * FROM Workorder WHERE (WoType = 'EM') AND (Status = 'NEWWO') AND (OpenDate <#2002-Feb-19#) (Closed WO included)

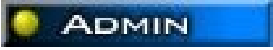If you have set up data divisions in your system, you will only be able to query records in your division or a division lower than yours. See Admin. – Tools – Administer Divisions for information about setting up divisions.

5.1   System Modules

Web Work includes the following modules:

WORK REQUESTS	Work Requests Module	▪ Enter work requests ▪ Query work requests ▪ Check the status of work requests
WORK ORDERS	Work Orders Module	▪ Create work orders ▪ Approve work orders ▪ Edit work orders ▪ Query work orders ▪ Close work order ▪ Print work orders
PROCEDURES	Procedures Module	▪ Create maintenance procedures ▪ Edit maintenance procedures ▪ Query maintenance procedures ▪ Assign tasks to procedures
PMs	PM Module	▪ Create PM templates ▪ Query PMs ▪ Generate PMs ▪ Add specifications to a PM
EQUIPMENT	Equipment Module	▪ Create equipment records ▪ Edit equipment records ▪ Query equipment records ▪ Print equipment records ▪
LOCATIONS	Locations Module	▪ Create location records ▪ Edit location records ▪ Query location records ▪ Print location records
INVENTORY	Inventory Module	▪ Create inventory records ▪ Add inventory items to a storeroom ▪ Query inventory records ▪ Storeroom Application
ITEM REQUEST	Item Request Module	▪ Create Item Requests ▪ Create Kits ▪ Issue Requests
PURCHASING	Purchasing Module	▪ Issue Purchase Orders ▪ Auto-Generate Purchase Orders ▪ Close Purchase Orders ▪ Vendor Application

RECEIVING	Receiving Module	▪ Receive Inventory
LABOUR	Labour Module	▪ Create employee records ▪ Edit employee records ▪ Query employee records ▪ Time card Application
ADMIN	Admin Module	▪ Set up user groups ▪ Assign users to a group ▪ Edit permissions ▪ Change user's password ▪ Set up system defaults ▪ Set up divisions ▪ Set up System Security
REPORTS	Reports Module	▪ View Standard Reports ▪ Create Custom Reports
INTERFACE	Interface Module	▪ These is an optional module which permits you to import and export information from Web Work to ASCI text files which can be used by other programs.

The Storeroom Module is located within the Inventory module.

The Timecard Module is located within the Labour module.

The Vendors Module is located within the Purchasing module.

6.1 Screen Layout

Click on the OPERATIONS, RESOURCES, TOOLS or HELP to view the drop down menus.

Click on the Module buttons to open the applicable module.

Click on the QUERY button to view a list of the codes contained in the Web Work database.

Click on any field name to open the help file for that field.

The Mode you are in is displayed at the bottom of the screen.

The module name is displayed here.

Click on the NEW button to open a new record, click on the LOOKUP button to perform a query or click on the CLEAR button to clear the information in the current record.

6.1.1. Internet Tool Bar
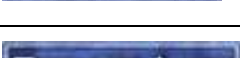
The Internet tool bar can be used to:

- Click on the Stop button if a page you are trying to open is taking too long to load.
- Click on the Refresh button to display the latest version of the page.
- Click the Home button to return to your home page.
- Click the Search button to open a search engine.
- Click the Favorites button to view your favorites list.
- Click the History button to view a list of the sites you visited recently.
- Click the Mail button to access mail functions.
- Click the Print button to print the current screen.
- Click on File, New, Window, while in Web Work to open another window in Web Work. Note you must refresh the additional window and login to the system in this new window.
- Click on the Help menu item while in your internet browser for additional internet help.

To email a PM Work Order, labour record etc. Print the record to the screen and then click on File, Send, Page by Email which will open your default email program with the page you have chosen as an attachment. The Work Order module has built in email functionality. See Work Orders – Email for more information.

7.1   Program Icons

Icon	Name	Function
ADD NEW	Add New Button	Adds new information to a record
APPEND	APPEND Button	Adds information to the record
	CALENDAR Button	Displays a calendar
CANCEL	CANCEL Button	Cancels the current operation
CLEAR	CLEAR Button	Clears the current field
CLOSE	CLOSE Button	Closes the current screen
CREATE LINK	CREATE LINK	Creates a link
DELETE	DELETE Button	Deletes an activity
DUPLICATE	DUPLICATE Button	Duplicates a record
EDIT	EDIT Buttons	Displays the current record in edit mode
	FILTER Button	Filters records according to the selected criteria
GENERATE	GENERATE Button	Generates PMs
HELP	HELP Button	Displays help specific to the current module
HELP	HELP Button	Displays Overview of help
ISSUE	ISSUE Button	Issues an item
LOG OFF	LOG OFF Button	Exits the system
LOOKUP	LOOKUP Button	Activates the query
MODIFY	MODIFY Button	Changes an item

Icon	Name	Function
NEW	NEW Button	Opens a new record
NEW QUERY	NEW QUERY Button	Opens the current module in query mode
OK	OK Button	Confirms the current action
OPERATIONS	OPERATIONS Button	Displays a drop down menu listing the operations available in the current module
PRINT	PRINT Button	Prints the current record
	Query Button	Displays the results of a system defined query
RECEIVE	RECEIVE Button	Receives an item
RESERVE	RESERVE Button	Reserves an item
RESOURCES	RESOURCES Button	Displays a drop down menu listing the resources available in the current module
RETRIEVE	RETRIEVE Button	Retrieves the selected records
RETURN	RETURN Button	Returns an item
SAVE	SAVE Button	Saves the open record.
SEND	Send Button	Sends the record to the email recipient you have selected
TO ACTUALS	TO ACTUALS Button	Converts the estimates selected to actuals
TOOLS	TOOLS Button	Displays a drop down menu listing Web Work tools such as Links and Reports
	UPDATE/EDIT Button	In the System Defaults screen click on this button update system defaults. In the Report Writer click on this button to edit an existing report

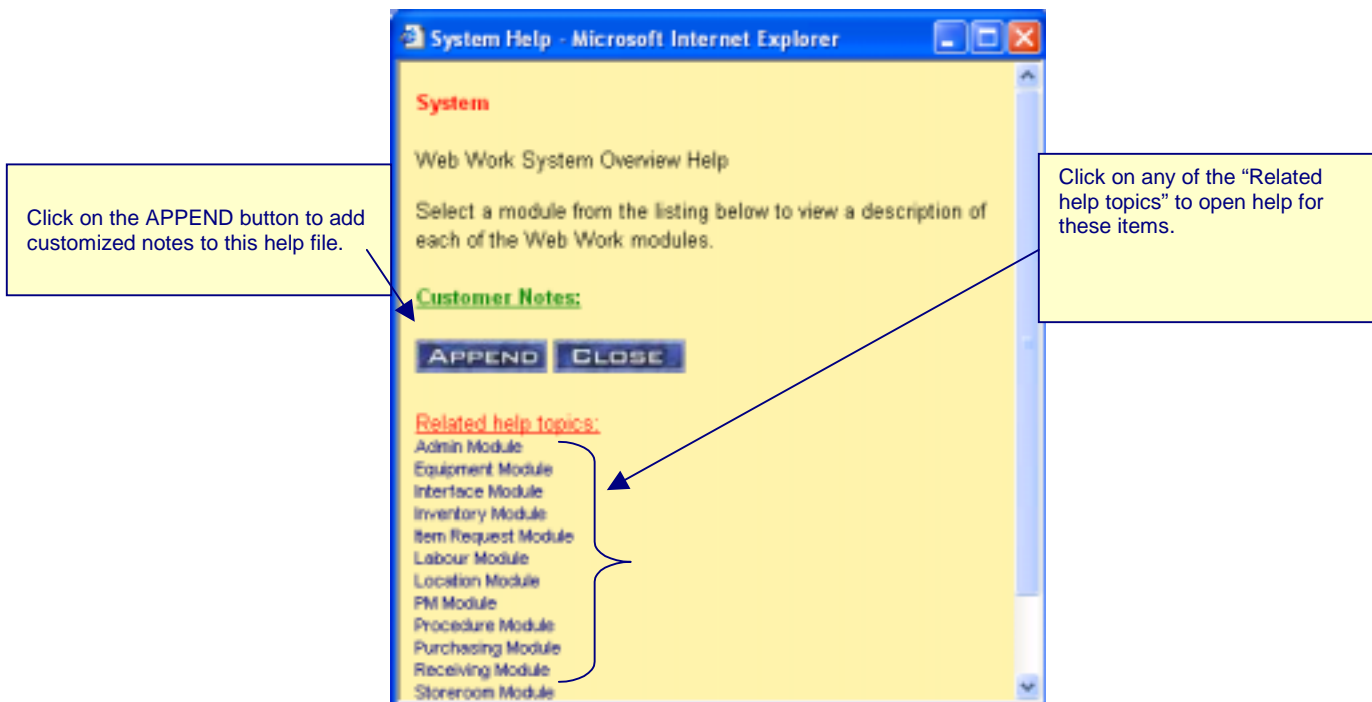Click on the menu buttons to view a list of the menu options available in each module.

OPERATIONS   RESOURCES   TOOLS   HELP

The F12 key is a hot key, which you can use to save a record.

8.1 Web Work Help Options

Web Work is user friendly and includes a number of help options, including customized help fields.

8.1.1. System Overview Help

Click on the HELP command button on the left hand side of the screen ⬤ HELP to display System help.

Click on the APPEND button to add customized notes to this help file.

Click on any of the "Related help topics" to open help for these items.

8.1.2. Module Help

Click on the HELP button ⟳ HELP on the top right hand side of the page to display a drop down menu listing the following menu items:

a. Current Module Help (ie Work Order Help): displays an overview of the current module and a list of help topics related to that module.
b. Tero Consulting Home Page: connects you to Tero's Home Page on the World Wide Web. (www.teroconsulting.com)
c. Technical Support: connects you to Web Work Frequently Asked Questions where you can view answers to frequently asked questions about Web Work, or obtain live help. While a technical support representative is online, the icon at the bottom of the screen will say 'Click for a real person'. Click on the icon to chat live with a tech support representative. Otherwise, the icon should say 'Leave a message' – click to send a message to support@teroconsulting.com
d. License Agreement: click on this menu item to display a copy of your Web Work license agreement.

e. About WebWork: This will open a window, which displays information about the version of Web Work you are working on as shown in the picture below:

The Web Work version number is displayed in this screen.

Click on Close Window or on the X to close the About Web Work window.

When you select any of the items from the HELP button 🔵 **HELP** they will open in a New Window.
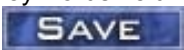
8.1.3. Field Help

Each field has a help file, which provides details about that field. To access a help file for any field name, just click on the applicable field label. A new window will open displaying the help for the field you selected.

8.1.4. Customizing Help Files

Web Work helps files can be personalized to include notes and procedures specific to your organization.

To add notes to help files:

1. Click on the field name that you wish to add notes to. (ie: WO Type). This will open the help file for this field. (ie: WO Type Field Help)
2. To add your own notes click on the *APPEND* button **APPEND** which will open a customer help notes screen.
3. In the field called Help Text, enter your notes. (ie: only the maintenance supervisor can assign a type to a work order).
4. Enter key words into the Key words field. (ie: Supervisor, assign)
5. Click on the SAVE button **SAVE** which will take you back to the field help screen. The information you added will be listed under Customer Notes on this help screen.

The Custom Help Notes screen is shown below:

Write your personalized help notes into the Help Text field.

Click on the SAVE button to save the notes or the CANCEL button to cancel this action.

You may wish to add corporate policies or procedures under your help notes. For instance if only maintenance supervisors are allowed to approve work orders, enter this note under work order help and other users of the system will know who to contact when a work order has been created but is pending approval.

The help files are written in html code.

The most common html codes you may want to use are:

 - to insert a new paragraph
 - to make the text bold or to stop using bold text
<u> - to underline the text or </u> to stop using underlined text
<i> - to make the text italics or </i> to stop using italics text

8.1.5. <u>Tip of The Day</u>

The Web Work system includes a Tip of the Day pop up screen, which displays helpful hints about using the Web Work system. To enable the Tip of the Day screen click on the "Tip of the Day" title on the top right hand side of the main screen of the Web Work system.

To disable Tip of the Day, uncheck the Show Tips at Start up checkbox.

Uncheck the Show Tips at Startup checkbox to disable the Tip of the Day
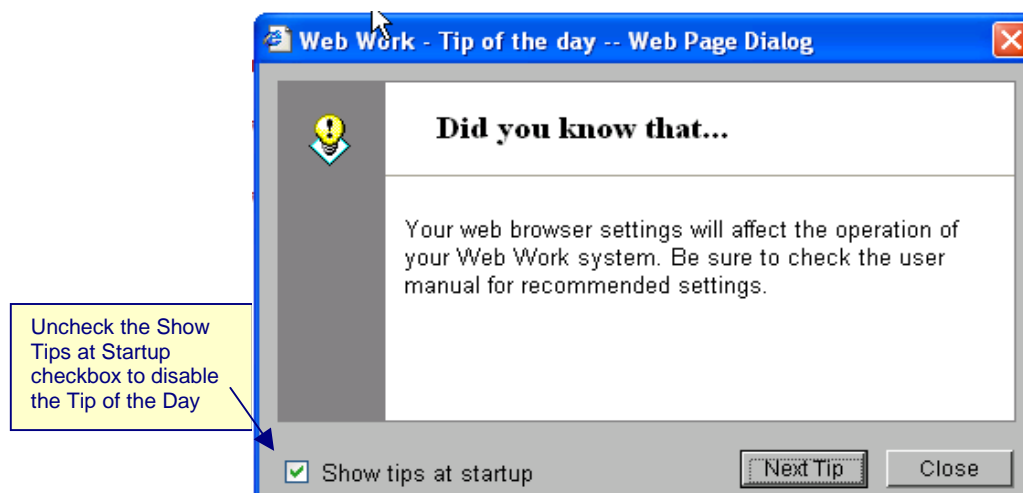
8.1.6. <u>Contacting Tero Consulting Ltd.</u>

To obtain Customer Support:

- Call Tero Consulting Ltd. at (604) 468-1401 between 8:00 a.m. and 4:30 p.m. PST Monday to Friday.
- Email your questions to support@teroconsulting.com
- Click on the ↺ HELP menu and choose Technical Support from the drop down menu to view answers to Frequently Asked Questions or to obtain Live Help using Human Click.

9.1   Web Work – Cellular Phone Features

Web Work has an optional Cell Phone module, which you can purchase. With this add on module you can:

- Send work orders out to crews via the built-in email system
- Retrieve work orders on your Cell phone
- Review work order instructions, location and equipment information
- Change work order status
- Look-up inventory items by storeroom

With easy scroll through menu options, field crews can retrieve all the information they require to perform their tasks and log the details using their Cellular phones.

Even without this add on module Work Orders can be sent to any cell phone that is web enabled. See work orders email for more information about sending work orders to a cell phone.

10.1 Changing your Password

User's passwords are setup and can be changed in the Admin module. However, it is unlikely that all user's will have access to the Admin module and therefore this feature has been added to the Work Requests and Work Orders modules.

To change your password while in these modules:

- Enter the Work Requests or Work Orders module.
- Click on the ↻ HELP menu and select Change Password from the drop down
- Type in a new password for the user shown.
- Click on the SAVE button SAVE to save the new password or the CANCEL button CANCEL to exit without updating the password.